

Those first steps  
towards changing banks  
can be tricky.

We're here to help.



Spending a little time moving to Nusenda Credit Union can save you hundreds each year. Plus, membership qualifies you for Earn Your Return, the program which allows member-owners to earn money back simply by consolidating financial relationships. The more relationships you have, the more you can earn. Banking that puts you first. Banking that gives back to you.

Below is an easy step-by-step guide and checklists to make the switch to better banking easy.

<input checked="" type="checkbox"/>	<b>The first step is easy, and it's already done - open an account with Nusenda Credit Union. Welcome to better banking.</b>
<input type="checkbox"/>	<b>Leave your account(s) at your previous institution open until all services have completely switched to Nusenda Credit Union.</b> <ul style="list-style-type: none"> <li>• It can take between 30 - 60 days for various organizations to switch direct deposits and automatic payments to your new account(s).</li> <li>• It might be a good idea to leave a small balance at the previous institution to cover automatic payments you may have during the transfer period.</li> </ul>
<input type="checkbox"/>	<b>Gather information about direct deposits and automatic payments that you will be switching to your Nusenda account.</b> <ul style="list-style-type: none"> <li>• Use the account checklists on the next page to help.</li> <li>• Monitor and track these accounts so you know when they have switched.</li> </ul>
<input type="checkbox"/>	<b>Transfer your direct deposits and automatic payments to Nusenda</b> <ul style="list-style-type: none"> <li>• Contact your payroll company, account administrator, or HR department about how to switch your direct deposit. Get a time frame for the transfer to be completed.</li> <li>• Contact each organization and get instructions on how to transfer your automatic payments; this can often be done very easily online or by phone.</li> <li>• Be sure to cancel automatic Online Bill payments with your old financial institution.</li> </ul>
<input type="checkbox"/>	<b>Track Progress</b> <ul style="list-style-type: none"> <li>• Log in to your Nusenda account(s) using online banking or the mobile banking app to keep track of progress related to switching your accounts.</li> <li>• Note progress using the account checklists on the next page.</li> </ul>
<input type="checkbox"/>	<b>Close your old accounts</b> <ul style="list-style-type: none"> <li>• Close old account(s) with your previous financial institution; some may require your request in writing.</li> <li>• Ensure that all your direct deposits and automatic payments have successfully transferred prior to closing your account(s). The account checklist on the next page can help.</li> </ul>

Information Checklist			
Nusenda Credit Union Routing Number:	307083665	Nusenda Credit Union Account Number	
Previous Institution Routing Number		Previous Institution Account Number	

Direct Deposit Checklist		
Deposit Source	Estimated Transfer Date	Verified Transfer Complete
Employer Payroll		
Government		
Social Security		
Investment Acct.		

Accounts to Close		
Financial Institution	Date Request Submitted	Date Verified Closed

Automatic Payments Checklist		
Payment	Date Change Requested	Verified Change Complete
Gas		
Electric		
Telephone		
Water Utility		
Cable/Satellite		
Internet		
Insurance		
Mortgage/Rent		
Credit Card		

Don't forget to:

- ☐ Destroy old checks
- ☐ Cut up old ATM/Debit Cards
- ☐ Destroy old deposit slips

We are here to help. If you need assistance, call us at 505-889-7755 (800-347-2838 outside the Albuquerque area) or visit us at [nusenda.org](https://nusenda.org).

